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ABSTRACT

The Systems Approach Model (SAM) is a dynamic approach to planning adult and continuing education that is intended to provide the flexibility, creativity, and meaningfulness necessary to meet the needs and interests of an ever-expanding and ever-aging student population. The SAM model consists of the following dynamically interrelated and interdependent components: needs assessment, instructional planning and development, administration and budget development, program implementation, and formative summative evaluation procedures. Because SAM allows for entry at any phase and because evaluation occurs throughout the entire planning process, the model provides a viable alternative to program planning using existing linear models. Furthermore, SAM allows planners to attend to the planning process from the position of what is rather than what might be. Since SAM is a comprehensive system, it may be viewed as a holistic approach to the entire program planning and teaching or learning process as well as a complete planning process in itself. Industrial and corporate business environments, continuing education for professional groups, and corporate conferences are only a few of the diverse programs that can be planned with the help of the SAM model. (MN)

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SAM WORKS! A SYSTEMS APPROACH MODEL FOR ADULT EDUCATION PROGRAMMING

A Paper Presentation

TO

THE 1986 AMERICAN ADULT
AND
CONTINUING EDUCATION CONFERENCE

Hollywood, Florida
October 25, 1986

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SAM WORKS! A SYSTEMS APPROACH MODEL FOR ADULT EDUCATION PROGRAMMING

Introduction:

Adult Education Programs - enrichment classes to conferences will continue to expland rapidly in the next decade. Planning successful adult and continuing educations program are a necessity if we are to meet the demands and pursuits of a lifelong learning society. Choosing, developing, and designing the most appropriate program plan to ensure success is vitally important. However, it seems that some well planned and coordinated adult and continuing education activities or programs succeed while others fail. Some programs meet their educational objectives while others do not. The program plan and design that program coordinators ultilze and implement may be the ultimate cause and reason for success or failure.

Programs for the Adult Educators and Learners must be both flexible and meaningful to address the needs and interests of the target population. Lifelong learning programs must also meet the needs of the ever expanding and greying populations. Successful planning of a single program must include the elements of flexibility and creatively and demonstrate a system of evaluation throughout the planning process to address the needs of such a diverse population of adult education. Program directors must have the meaningful tools and skills required for successful

planning. SAM or a dynamic Systems Approach Model provides such a foundation for successful program planning and development.

The following outcomes will be provided as a result of our paper presentation.

1. A presentation of and rationale for a dynamic systems approach model for program planning and development.
2. A review of the current literature of program planning models.
3. An explanation of the interrelated components of the SAM Model.
4. Suggested applications of the SAM Model for utilization by adult education program planners.

Review of The Literature:

Traditionally, linear models of progam planning have been used in the structure of adult and continuing education programs (e.g. Bergevin, Morris & Smith, 1963; Houle, 1972; Knowles, 1980; and Smith, 1982). These linear models share commonalities in their process elements. Generally, they begin with a thorough needs assessment, proceed to establish program priorities and responsiblities, select program objectives to address a suitable theme, allocate available resources, select appropriate instruction (ors) and teaching/learning techniques and evaluate the results or outcomes and finally determine program effectiveness. The steps of the linear models are sequential, very thorough and include the necessary measures to produce quality programs.

Sork and Buskey, 1986; did a very comprehensive review of the program planning literature from 1950 to 1983 and reviewed six important analytical conceptual features of descptive and evaluation dimensions of approximately fifty-one (51) training or program planning models. The authors determined six major elements in a majority of the models contained : 1) The Planning Context (Environment or organizational setting in which the model was intended to be used). 2) The level of "program" emphasized either a single educational activity or single organizational offering or comprehensive program for a community. Sork and Buskey judged that the linear steps used in the various program levels were similar. 3) Client system or membership orientation another important consideration for planners because, according to Sork and Buskey it implied "The ease with which clients could be identified".(p.89) 4) Some models were very simple in design and others were very complex and required additional experience or training to implement them. Therefore, a "user dimension" was an important consideration. 5) A theoretical framework was the fifth dimension; that is, models ranged from a "cook book approach" to a greater theoretical propositions or assumptions based on a rating system. 6) The sixth dimension of the conceptual meta-analysis of program planning models was: The Comprehensiveness of Steps In the Planning Process. Sork and Buskey determined that a generic planning model composed of nine <u>specific steps</u> was synthesized from the literature and used as a benchmark for determining the degree to which other models

addressed all the tasks of planning. Sork and Buskey synthesized the steps of the generic planning model as:

-Analysis of the planning context and client system served.

-Assessment of client system needs.

-Development of objectives.

-Selection and ordering of content.

-Selection, of instructional resources.

-Formulation of budget and administrative plan.

-Design of a plan for assuring participation.

-Design of a plan for evaluating of the program. (p.89)

Edgar J. Boone (1985) in his text: Developing Programs In Adult Education compared and evaluated nine different programming models that dealt with the processes relevant to programming in adult education. The models reviewed included: (Beal et al., 1966; Boone, Dolan and Shearon, 1971; Boyle, 1981; Freire, 1970; Houle, 1972; Kidd, 1973; Knowles, 1970; Lippitt, Watson & Westley; 1958, and Tyler, 1971.). Boone's program model analysis consisted of classifying the models accordingly: 1) the context, 2) scope, 3) philosophy, 4) perspective, 5) applicability and 6) main "Themes" of each program model. "The most basic similarity in the models, according to Boone, was that all of them have basic programs/processes of educational development in which the following elements were present: (1) problem/need definition; (2) setting of objectives, goals and means; (3) some formal and informal learning activity; and (4)

either have an explicitt and/or an implicit evaluation process". (Boone, 1985 p.34).

Boone (1985) believed that there were other threads which bound these models together. All were adaptable to most, if not all, adult education contexts. All of the programming processes were based on either explicit or implicit educational and social philosophies. And all of the authors cited expressed concern for the needs and interest of learners. (pp. 34-36).

A conclusion or observation that the writers derived from the review of the literature, Murk and Gallbraith (1986), Sork & Buskey (1986), and Boone (1985), is that all of the models reviewed and analyzed to date still held to the notion of a sequential linear process of program planning and development. Some models emphasized greater involvement on the part of the planners, or held to the comprehensiveness of program systems. The majority of the models included an instructional design process. And most models held to an evaluation and accountablity process. But, the notion of a linear sequential process remained thus far in the models examined...

However, due to the sequential nature of linear program models, overlooking or omitting a step in the planning process may cause the program to fail since such models provide no easy method for returning to the previous stages of the process.

The purposes of this paper, then, are 1.) to describe a dynamic Systems Approach Model (SAM) for planning successful

adult education programs and/or conferences and 2.) to present implications and applications it has for adult educators and program practioners in the field. Using SAM can provide a viable alternative plan that could ensure program planners greater flexibility, creativity, and practicality in the planning process.

The Systems Approach Model

SAM or Systems Approach Model is an evolution and /or adaptation of the previous works by McKinley and Smith (1965) and those most recently updated by McKinley (1980) and by Smith (1982). The components of SAM are illustrated in Figure 1. SAM consists
of five components that are dynamically interrelated and interdependent. However, for SAM to be successful all five of the components must be addressed. The model has been tested and proven effective in several program planning experiences and has received positive evaluations toward providing and achieving desired outcomes of successful adult and continuing education programs.

SAM allows program planners to work effectively on two or three of the components simultaneously depending upon the reality of the situation, i.e. time constraints, limited finances, or committee assignments focus. SAM allows planners to deal with what is rather than what might be. Each component of the model will be discussed separately. Then the interrelation and interdependency of the model's components will be demonstrated.

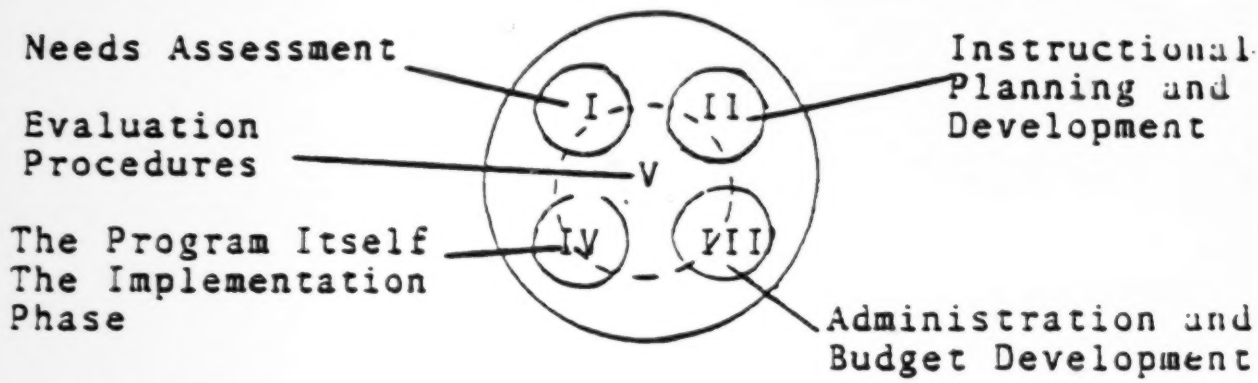


Figure 1.
The Major Components of The Systems Approach Model

Needs Assessment-- in defining a needs assessment, it is important for the program planners to be cognizant of the major purpose(s) or rationale as to why such a program should be developed. Once the purpose is determined a subsequent question should be addressed: Who should attend the program? The use of formal needs assessment techniques to address the questions are recommended such as questionnaires, survey samplings, and telephone surveys to pinpoint the target population to be assessed for the program. Informal needs assessment procedures such as personal conversation, networking procedures and client group involvement may also be useful. These assessment tools should be utilized in a systematic fashion to help provide an adequate decision-making base. Planners should, of course, understand the needs, aspirations, and limitations of adult learners as participants, but should also recognize that they are an integral part of the needs assessment process. Studying the characteristics of the population and community structure, categorizing existing programs and establishing priorities all play an important part as well.

Instructional Planning and Development--Once the program participants are identified, the purpose of the program has been established, and the needs of the group have been determined, program planners are ready to plan and develop an instructional process. This planning process includes:

* defining the purpose/theme of the event/program;
* identifying program outcomes through written mean-

ingful goals and objectives;

* selecting appropriate activities and packaging instructional/learning materials in an attractive format;

* identifying effective instructors or resource persons with approptiate qualifications and credentials;

* identifying program logistics includes facilities coordination, audio-visual techniques, and scheduling of time, people and events; and

* developing and administering formative evaluation procedures which build on the program's goals to the program's success and meaningful instruction and learning.

Administration and Budget Development-- Planning the administration and budget is the third component of the SAM. This component's process includes:

* formulating a cost effective budget;

* determining direct and indirect costs and charges, setting realistic fee structures and obtaining adequate clerical and support services;

* securing a funding sources through grants or endorsements from associations if funds are not already available;

* establishing administrative mechanisms to handle enrollment and registration procedures, refund policies and a reliable bookkeeping system;

* developing competency in public relations and advanced publicity procedures;

* coordinating facilities to ensure adult "creature comforts" are met, such as proper heating, lighting, ventilation, room arrangements, refreshments breaks, meals and other miscellaneous details are properly administered.

Implementation of the Program--Implementing a successful adult or continuing education program requires constant

coordinating and monitoring efforts by the program planners. Reaching the program's goals and objectives may depend upon the planners' abilities to provide the necessary instructional materials, equipment and supplies as well as organizing the support staff to function efficiently. Implementation also provides for the accommodation of special needs of the program participants. Offering appropriate credit and recognition of program completion is a very important component. As in any well planned program, unexpected "crises" often do occur. The planners should monitor the facilities, the instructional content and pacing, and make the necessary program or schedule adjustments to ensure participant satisfaction and optimum learning effectiveness. A workable knowledge of audio-visual techniques, planning procedures and coordinating skills can assist in warding off any last minute crises. In fact, it is often better for the planners to "overplan" a program than to "underplan" in order to ensure success.

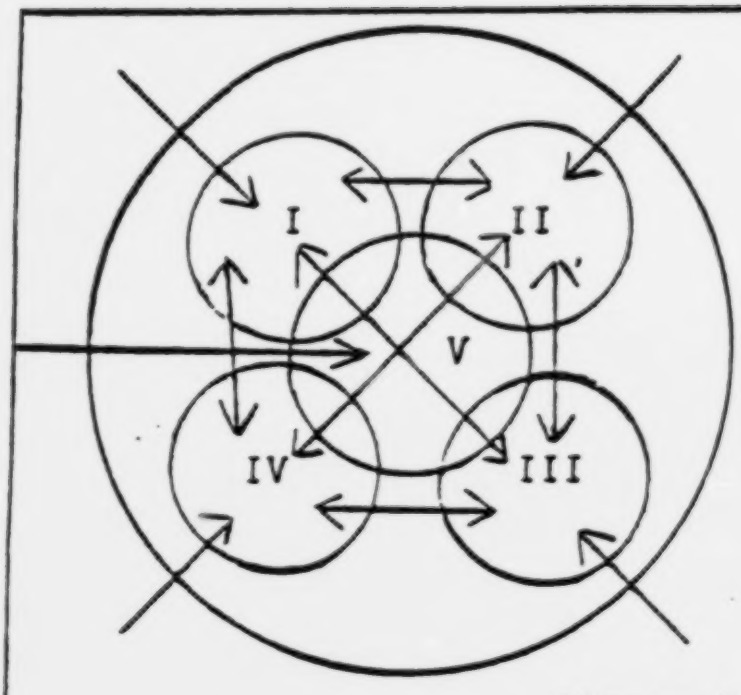
Evaluation Procedures--Planners should use formative and summative evaluation procedures in planning programs. In using formative evalualtion procedures, the program's effectiveness is measured at each component phase throughout the planning process. Designing progressive evaluation instruments within the needs assessment component allows the planners to determine the participants' identities, needs, and interests. Establishing suitable learning evaluation strategies in the instructional planning and development component assists in formulating meaningful goals and objectives and assists in identifying the

appropriate resource persons and instructors. Revision of the program goals for future programs or problem areas could be addressed so that appropriate changes could be made. Evaluation procedures can be utilized in the development of a cost-effective budget, securing adequate staff and personnel and in measuring effective administrative procedures within the administration and budget development component of the model. Formative evaluation procedures are necessary in assisting the monitoring process and identifying any changes that must be made that occur during the program implementation phase. This constructive criticism is both necessary as well as useful for the program planners to ensure program success.

A summative evaluation is conducted near the end of the program activity. Interpreting the data and level of teaching/ learning satisfaction from the participants, staff and instructor help planners to determine if the program was effective and if the participants achieved their desired learning outcomes. The results of the summative evaluation can be used in the planning of future programs.

Applications of SAM

SAM as previously described, allows for greater flexibility, practiciality and creativity on the part of the planners. As illustrated in Figure # 2, it is possible to enter the systems model at any given component.



I Needs Assessment

II Instructional Planning

III Administration and Budget

IV Implementation

V Evaluation

Figure 2.

The Systems Approach Model allows entry at any Phase Also note that evaluation occurs throughout the planning process.

For example, take a case in which the planners sought and received a substantial grant to plan a program. The starting point in the model is logically at the Administrative and Budget Component. Ulitizing a systems approach, a thorough needs assessment (Component I) would be conducted, instructional plans (Component II) would be designed, the program implemented (Component IV), and the evaluation procedures (Component V) established.

In another example, a well-known educator agreed to be part of an adult or continuing education program. The starting point for this example is logically as the Instructional Planning Component (Component II) in which the entire program is developed around the esteemed educator's availability and participation. However, again, each of the other components of SAM must be addressed to ensure program success, but not necessarily in a sequential manner, as in a linear program planning approach.

A final illustration of SAM can be made. What if last year's program failed miserably? The beginning point in the sequence is logically Component (V) (Evaluation) in an effort to determine why the program did not succeed. The planners could begin the evaluation process with Component IV i.e. (Implementation of the Program) and addresses two separate questions: Was the program monitored carefully and adequately? or Was the program meaningful to the participants? In this case, a thorough needs assessment still needs to be accomplished, a budget

developed, and the learning objectives analyzed to ensure a successful program.

Implications For The Practitioner

SAM allows for a viable alternative to program planning approach in lieu of the linear planning models. Entrance can be accessed into the model at any given component, depending on the reality of the situation or the strongest felt need at the moment for the planners to fulfill. Further, the planners can attend to the planning process from the position of what is rather than what might be. However, it should be stressed that all five components of the SAM must be followed carefully in order for the Systems Approach Model to operate effectively because of its intependency of components.

The model takes into consideration some pre-planning steps or "givens" accomplished previously by the planners; for example, perhaps several of the committee assignments were already completed beforehand. Access into the SAM can then be made with this prior knowledge or with previous actions taken, without going back to "square one".

The systems approach to progrm planning can be readily understood, can be easily followed, and can be adapted by various consitutent groups. Many administrators desire that programs should be productive, cost effective, and profitable. Instructors desire measured learning outcomes and indications of behavioral change, skill development, or attitudinal adjustment.

Program planners want the program activities to flow in a well ordered logical manner. And most importantly, the program participants want to achieve their desired outcomes (learning objectives) as well as obtained their time and monies' worth. SAM can meet these program expectations if followed carefully.

SAM, since it is a comprehensive system, may be viewed as a wholistic approach to the entire program planning - teaching or learning process as well as a complete planning process in itself. In addition, the planners can further use the components as diagnostic instruments to ensure that the learners' needs were assessed, meaningful instructional objectives were established, a realistic budget was set up and administered properly, a logical agenda of activities was followed, and that significant evaluation procedures were completed.

Finally, the SAM can be adapted to a variety of settings and could be utilized by different program planning groups. Sam may be used in an industrial or corporate business environment whereby teaching specific skills or intensive training and development procedures are the goals of the program plannning process or training seminar. SAM may also be used in planning continuing education experiences for professional groups such as accountants, attorneys, or corporate administrators. SAM can also be used to plan successful corporate conferences for adult and continuing educators at the local, state, regional and national levels.

Conclusions and Implications For Further Study

A systems approach model for program planning that can be adapted for a variety of different groups and settings in a lifelong learning society seems to warrant additional investigation. For example, the use of the computer can be a positive innovation to assist the planners. SAM has not been married to such a mechanized mate thus far. In addition, there may be some limitations to the SAM model such as the notion of Program Impact Evaluation on individuals, groups, or associations, this is a situation which could be further developed and expanded. Impact evaluation procedures need to be further tested -- perhaps using SAM as a starting point.

However, the Systems Approach Model (SAM) can provide an alternative approach to planning successful adult and continuing education programs. SAM does work!

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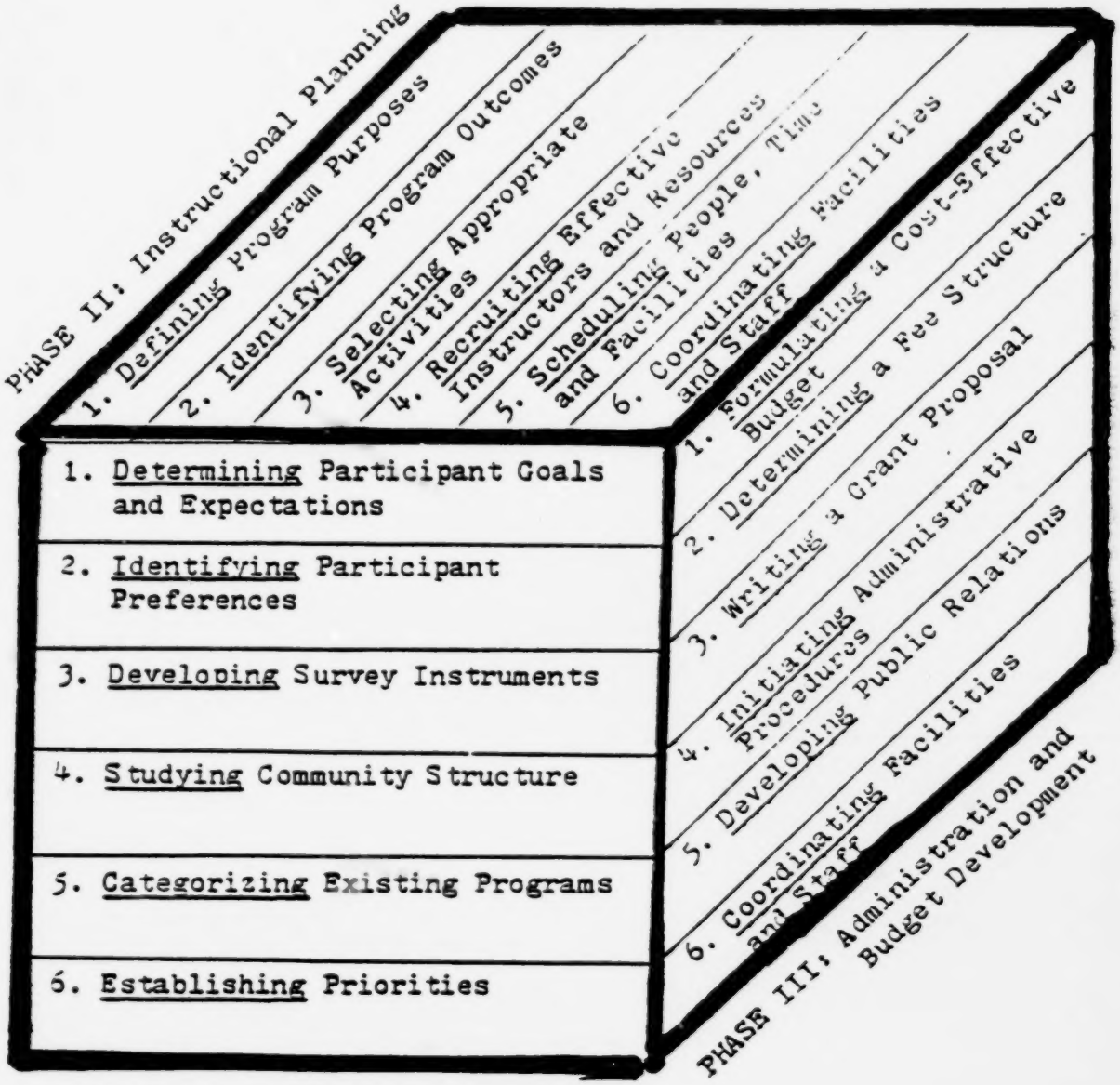
PHASE II: Instructional Planning
1. Defining Program Purposes
2. Identifying Program Outcomes
3. Selecting Appropriate Activities
4. Recruiting Effective Instructors and Resources
5. Scheduling People, Time and Facilities
6. Coordinating Facilities and Staff
1. Determining Participant Goals and Expectations
2. Identifying Participant Preferences
3. Developing Survey Instruments
4. Studying Community Structure
5. Categorizing Existing Programs
6. Establishing Priorities
PHASE I: Needs Assessment
1. Formulating a Cost-Effective Budget
2. Determining a Fee Structure
3. Writing a Grant Proposal
4. Initiating Administrative Procedures
5. Developing Public Relations
6. Coordinating Facilities and Staff
PHASE III: Administration and Budget Development

Figure 3 Three of the facets of the Systems Approach Model (SAMI) arranged in visualized matrix analysis format.

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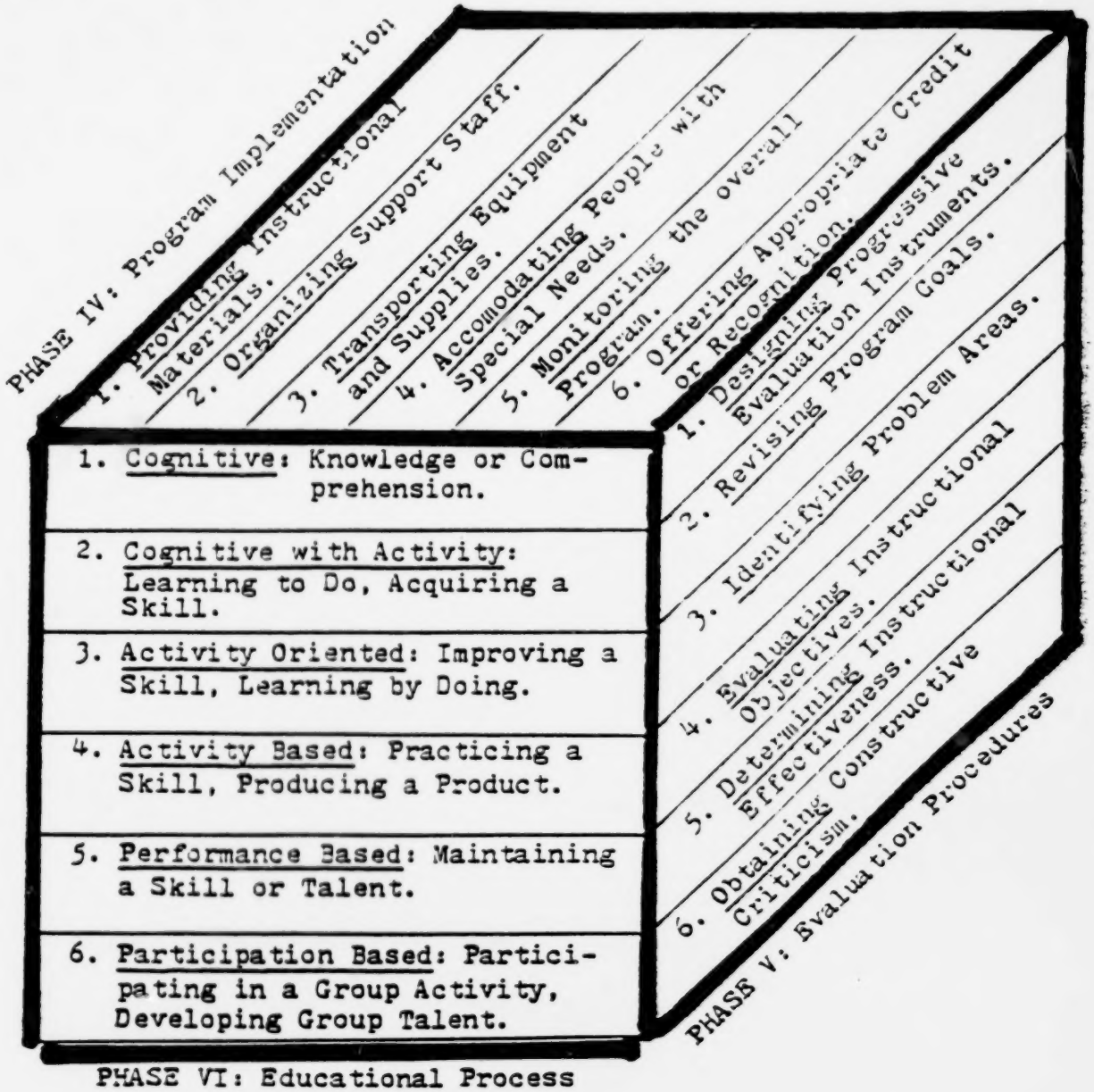
PHASE IV: Program Implementation
1. Providing Instructional Materials.
2. Organizing Support Staff.
3. Transporting Equipment and Supplies.
4. Accomodating People with Special Needs.
5. Monitoring the overall Program.
6. Offering Appropriate Credit or Recognition.
1. Cognitive: Knowledge or Comprehension.
2. Cognitive with Activity: Learning to Do, Acquiring a Skill.
3. Activity Oriented: Improving a Skill, Learning by Doing.
4. Activity Based: Practicing a Skill, Producing a Product.
5. Performance Based: Maintaining a Skill or Talent.
6. Participation Based: Participating in a Group Activity, Developing Group Talent.
PHASE VI: Educational Process Determinatives
1. Designing Progressive Evaluation Instruments.
2. Revising Program Goals.
3. Identifying Problem Areas.
4. Evaluating Instructional Objectives.
5. Determining Instructional Effectiveness.
6. Obtaining Constructive Criticism.
PHASE V: Evaluation Procedures

Figure 4 Three of the facets of the Systems Approach Model (SAMI) arranged in visualized matrix analysis format.

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